HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Saskatchewan

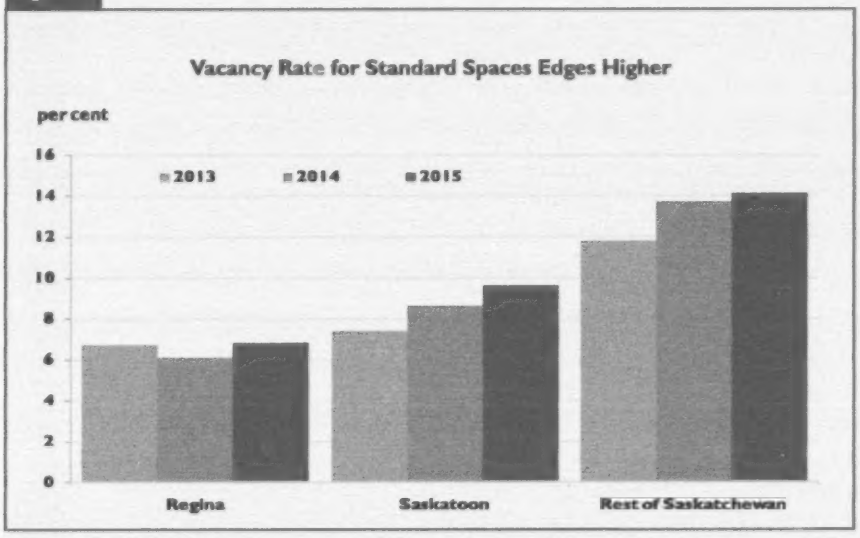
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2015

Highlights

- The overall vacancy rate for standard spaces in retirement homes in Saskatchewan was 10.6 per cent in 2015, compared to 9.9 per cent in 2014.
- In 2015, Saskatoon and Regina, the two largest urban centres, reported standard unit vacancy rates of 9.6 per cent and 6.8 per cent, respectively.
- The overall average rent in Saskatchewan for a standard retirement space was $2,667 in the current survey, compared to $2,713 in 2014.
- The 2015 survey identified 167 seniors' residences in Saskatchewan containing a total of 6,478 standard and non-standard spaces, and housing a total of 6,426 residents.

Figure 1



Source: CMHC

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SASKATCHEWAN VACANCY RATE OF STANDARD AND TOTAL (UNIVERSE) SPACES
Province Total
S: 10.6%
T: 8.6%
S: Standard Spaces
T: Total Spaces (Universe)
Number of Structures
1 - 31
32 - 33
34 - 37
38 or more
0 25 50 100 km
Saskatoon CMA
S: 9.6%
T: 7.0%
Regina CMA
S: 6.8%
T: 5.8%
Rest of Saskatchewan
S: 14.1%
T: 12.7%
Central Saskatchewan
Southern Saskatchewan

Vacancy Rates

Vacancy rate for standard care units edges higher

According to Canada Mortgage and Housing Corporation's (CMHC) 2015 Seniors' Housing Survey, the average vacancy rate for a standard retirement space in Saskatchewan was 10.6 per cent in 2015, compared to 9.9 per cent in the previous year. CMHC's survey targeted private and non-profit facilities where the majority of residents are over the age of 65 and have access to additional services not offered in traditional rental structures such as a meal plan, housekeeping, and laundry services.

The 2015 survey identified a total of 6,426 people living in seniors' residences in Saskatchewan out of an estimated 78,600 persons aged 75 years or older. This compares to 6,373 residents out of a population of 80,000 seniors in 2014, resulting in a capture rate of 8.2 per cent in 2015, compared to eight per cent a year earlier. Correspondingly, the total number of seniors' housing spaces, including standard and non-standard spaces, rose slightly to 6,478 units this year from 6,404 in 2014.

Between Saskatchewan's two Census Metropolitan Areas (CMAs), the higher vacancy rate for standard spaces was reported in the Saskatoon CMA at 9.6 per cent, up from 8.6 per cent in the previous year. In the Regina CMA, the vacancy rate was 6.8 per cent, compared to 6.1 per cent one year prior. The vacancy rate in the Rest of Saskatchewan edged higher to 14.1 per cent this year from 13.7 per cent in 2014.

Bachelor units continued to have the highest vacancy rate across the province in 2015 for standard spaces, at 13.6 per cent compared to 11.4 per cent one year prior. Spaces with two bedrooms or more reported the lowest vacancy rate at 4.7 per cent, compared to 6.2 per cent in 2014. In this bedroom category, Saskatoon had the lowest vacancy rate in 2015 for standard spaces at 1.7 per cent, compared to 1.9 per cent a year earlier. Bachelor suites had the highest vacancy rate of 14.5 per cent in the Saskatoon CMA this year. By comparison, Regina's lowest vacancy rate was reported in one-bedroom spaces at 4.4 per cent, while bachelor spaces had the highest vacancy rate at 9.1 per cent. Outside of the two CMAs, bachelor spaces also reported the highest vacancy rate at 14.7 per cent, while the lowest vacancy rate was found in two-bedroom and larger spaces at 7.1 per cent.

By rent range, standard spaces in Saskatoon charging a monthly rent of $2,500 or more recorded the highest vacancy rate at 11.9 per cent, while the lowest vacancy rate of 0.4 per cent was found in spaces charging less than $1,500 per month. In Regina, spaces charging a monthly rent of $2,500 or more per month recorded the lowest vacancy rate at 6.3 per cent, compared to 5.2 per cent in 2014. The highest vacancy rate in Regina of 7.4 per cent was for spaces with a monthly rent between $2,000 and $2,499.

Vacancies for heavy care spaces move higher

In Saskatchewan, the vacancy rate for heavy care spaces was 8.9 per cent in 2015, compared to six per cent in 2014. Heavy care spaces are classified as spaces in seniors' residences that provide 1.5 hours or more of health care per day to its residents. Examples include care for residents with Alzheimer's, Dementia and mobility support residents. Typically, the additional health care services provided to residents of heavy care facilities increases the rent over standard spaces.

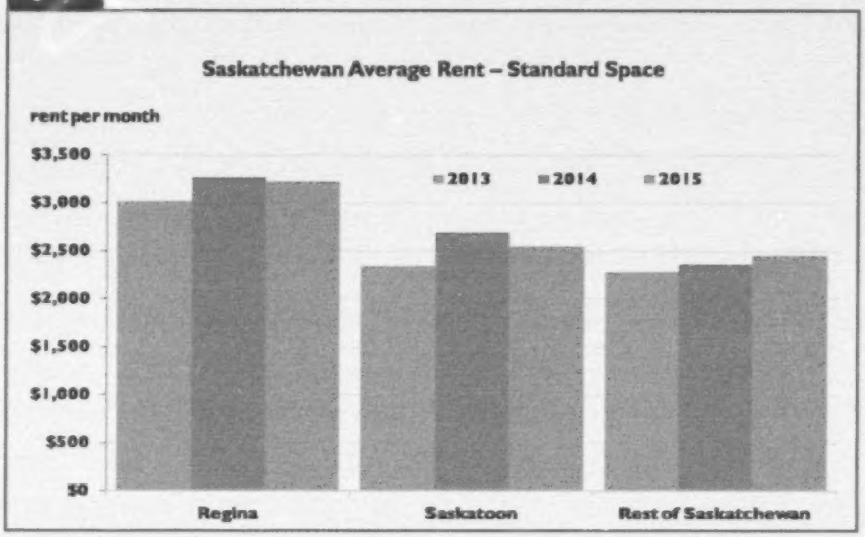
Rent

Average rent for standard spaces in Saskatchewan slightly lower in 2015

In Saskatchewan, the average monthly rent for a standard space was $2,667 in 2015 for all suite types, compared to $2,713 one year prior. The additional amenities and services provided in seniors' residences typically push rents above those in the purpose-built rental market. As well, average rents in seniors' residences are impacted by the different meal plan and services choices made by residents and thus can vary from one year to the next. In 2015, the removal of some structures with higher rents from the survey due to various reasons contributed to the slight decline in the average rent for a standard space in Saskatchewan. With the exception of semi private suites, all bedroom types reported a decline in average rent. Provincially, the largest decline was reported in one-bedroom suites with an average rent of $2,743 in 2015, compared to $2,949 in 2014.

Of the province's two CMAs, Regina reported the higher average monthly rent for two-bedroom and larger standard spaces in 2015 at $3,883, compared to Saskatoon's average rent of $2,812. Relative to the rest of the province, standard spaces in the Regina CMA generally attract the highest average monthly rent across bedroom types due to the centre's smaller universe and greater occupancy in newer structures.

Figure 2



Source: CMHC

Provincially, the distribution of standard spaces by rent range was concentrated more towards the higher rent ranges in 2015 mainly due to rents in Regina. In the current survey, Regina had nearly 87 per cent of standard spaces with an average rent of $2,500 or more. By comparison, Saskatoon and the Rest of Saskatchewan had 60 per cent and 41 per cent of standard spaces with rents of $2,500 or more, respectively. For units in the lowest price range, only six per cent of standard spaces in Saskatchewan charged less than $1,500 per month in rent.

Average rent for heavy care spaces declines

The average monthly rent for a heavy care space in Saskatchewan was $4,194 in 2015, compared to $4,309 in 2014. Typically, rents charged in heavy care spaces are higher than the average monthly rent for standard spaces as the health care service a resident requires in heavy care adds to the cost of rent. For example, the average rent for a heavy care space in Regina was $4,273 per month in 2015, compared to the average monthly rent for a standard space at $3,223.

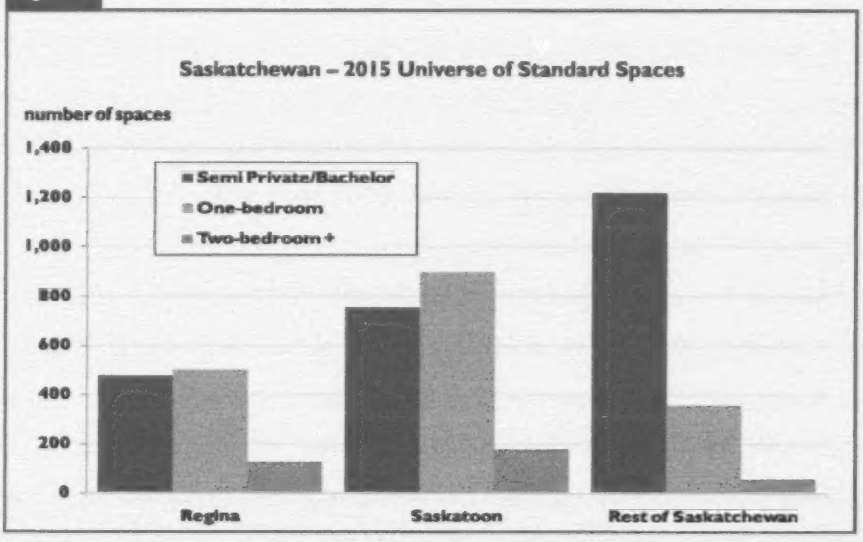
Universe

Universe of Retirement Spaces increases

There were four new structures opened in 2013 that became eligible for the 2015 survey, adding spaces to the retirement universe. Despite this addition, the number of seniors' residences in 2015 declined to 167 units from 168 in 2014. There were five residences from last year's survey that were excluded from the 2015 survey due to various reasons. In 2015, the number of retirement spaces increased to 6,478 from 6,404 spaces in 2014. Just over 70 per cent of the 6,478 spaces were identified as standard spaces, while the balance included non-standard spaces such as heavy care, non-market or rental subsidy spaces, and some being used to provide respite care.

Across Saskatchewan, semi-private and bachelor spaces were the most common, numbering 2,447 spaces or 53.6 per cent of the standard universe in 2015. However, in both the Regina and Saskatoon CMAs, one bedroom spaces accounted for the majority of the standard universe. In the Rest of Saskatchewan, semi-private and bachelor units made up 74.5 per cent of standard spaces in the current survey.

Figure 3



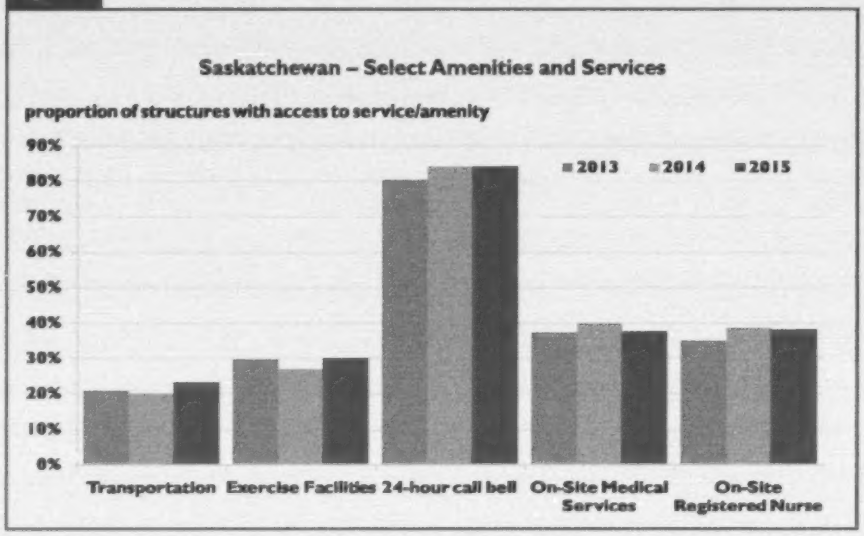
Source: CMHC

Services and Amenities

CMHC's 2015 Seniors' Housing Survey targeted residences where the majority of residents are seniors that have access to additional services not offered in traditional rental structures, such as an on-site meal plan. Seniors' residents were offered a variety of different amenities depending on the residence.

Similar to past years, the most common amenity in Saskatchewan was a 24-hour bell service, which was provided in 84 per cent of structures. The second most common amenity was on-site nursing services, which were available in nearly 38 per cent of seniors' residences. Other popular amenities accessible to residents included on-site medical services, internet, exercise facilities, and transportation services.

Figure 4



Source: CMHC

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
Regina CMA	**	**	7.2 b	9.1 b	4.8 c	4.4 c	4.5 c	7.9 b	6.1 b	6.8 b
Saskatoon CMA	**	**	11.3 b	14.5 b	6.4 b	6.9 b	1.9 c	1.7 b	8.6 b	9.6 b
Rest of Saskatchewan	**	**	13.5 b	14.7 b	11.2 b	12.1 b	23.3 b	7.1 b	13.7 b	14.1 b
Saskatchewan	**	**	**11.4 b**	**13.6 b**	**7.0 b**	**7.3 b**	**6.2 b**	**4.7 b**	**9.9 b**	**10.6 b**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates of Standard Spaces (%) by Rent Range ($)
Saskatchewan

Centre	Less than $1,500		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
Regina CMA	**	**	**	**	11.8 c	7.4 c	5.2 c	6.3 c	6.0 c	6.6 c
Saskatoon CMA	**	0.4 c	1.6 c	5.8 c	5.7 c	11.4 c	11.8 c	11.9 c	8.5 c	9.6 c
Rest of Saskatchewan	4.6 c	5.1 c	12.3 c	12.4 c	11.5 c	13.1 c	17.5 c	16.4 c	13.7 c	14.1 c
Saskatchewan	**1.3 c**	**1.1 c**	**8.8 c**	**9.5 c**	**10.0 c**	**12.0 c**	**10.6 c**	**11.2 c**	**9.8 c**	**10.5 c**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces[1]
Saskatchewan

Centre	Vacancy Rate		Average Rent	
	2014	2015	2014	2015
Regina CMA	**	0.0 c	3,827 c	4,273 c
Saskatoon CMA	**	**	**	**
Rest of Saskatchewan	6.3 c	7.1 c	**	3,262 c
Saskatchewan	**6.0 c**	**8.9 c**	**4,309 c**	**4,194 c**

[1] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
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1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Saskatchewan

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2014	2015				
Regina CMA	1,359	5.2 b	5.8 b	37	1,370 b		
Saskatoon CMA	2,944	4.9 a	7.0 b	65	3,067 b		
Rest of Saskatchewan	2,175	13.2 a	12.7 a	65	1,989 a		
Saskatchewan	**6,478**	**7.6**	**8.7**	**167**	**6,426**	**78,600**	**8.2**

[1] Source: Statistics Canada. Table 052-0005 - Projected population, by projection scenario , age and sex, as of July 1, Canada, provinces and territories, annual (persons),CANSIM

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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2.1 Universe of Total Spaces by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	672	560	127	1,359
Saskatoon CMA	1,073	1,554	317	2,944
Rest of Saskatchewan	1,588	494	93	2,175
Saskatchewan	**3,333**	**2,608**	**537**	**6,478**

2.2 Universe by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	**672**	**560**	**127**	**1,359**
Standard Spaces	475	502	127	1,104
Non-Standard Spaces	197	58	-	255
Unknown Spaces	-	-	-	-
Saskatoon CMA	**1,073**	**1,554**	**317**	**2,944**
Standard Spaces	754	897	177	1,828
Non-Standard Spaces	253	601	132	986
Unknown Spaces	66	56	8	130
Rest of Saskatchewan	**1,588**	**494**	**93**	**2,175**
Standard Spaces	1,218	359	56	1,633
Non-Standard Spaces	352	67	13	432
Unknown Spaces	18	68	24	110
Saskatchewan	**3,333**	**2,608**	**537**	**6,478**
Standard Spaces	2,447	1,758	360	4,565
Non-Standard Spaces	802	726	145	1,673
Unknown Spaces	84	124	32	240

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2.3 Universe of Standard Spaces by Rent Range ($)
Saskatchewan

Centre	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 and more
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Regina CMA	**	2.4	11.1	86.6
Saskatoon CMA	12.3	13.3	13.9	60.5
Rest of Saskatchewan	2.3	19.0	37.5	41.3
Saskatchewan	**5.8**	**12.8**	**21.8**	**59.6**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Saskatchewan

Centre	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Regina CMA	5.4	0.0	8.1	86.5	45.9	54.1	91.9	0.0
10 - 49	3.6	0.0	0.0	96.4	42.9	57.1	92.9	0.0
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0	0.0	50.0	50.0	33.3	16.7	100.0	0.0
Saskatoon CMA	17.2	9.4	3.1	70.3	32.8	32.8	78.1	0.0
10 - 49	4.7	2.3	0.0	93.0	37.2	39.5	88.4	0.0
50 - 89	50.0	25.0	**	25.0	12.5	12.5	75.0	**
90 or more	38.5	23.1	15.4	23.1	**	23.1	46.2	0.0
Rest of Saskatchewan	0.0	0.0	4.7	95.3	36.4	33.2	85.7	0.0
10 - 49	0.0	0.0	3.9	96.1	33.9	30.0	86.0	0.0
50 - 89	**	**	**	89.6	50.0	50.0	80.2	**
90 or more	**	**	**	**	**	**	**	**
Saskatchewan	**7.9**	**3.6**	**4.8**	**83.6**	**37.1**	**37.7**	**84.1**	**0.0**
10 - 49	2.5	0.8	1.6	95.1	37.1	39.5	88.4	0.0
50 - 89	23.8	9.6	5.0	61.6	42.7	42.7	76.3	0.0
90 or more	22.9	13.7	22.7	40.7	31.8	22.7	68.0	0.0

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

The following letter codes are used to indicate the reliability of the estimates:
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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Saskatchewan

Centre	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Regina CMA	**27.0**	**5.4**	**18.9**	**21.6**	**35.1**	**43.2**
10 - 49	10.7	0.0	7.1	7.1	14.3	28.6
50 - 89	**	**	**	**	**	**
90 or more	100.0	16.7	66.7	83.3	100.0	100.0
Saskatoon CMA	**20.3**	**3.1**	**6.3**	**9.4**	**31.3**	**28.1**
10 - 49	11.6	0.0	0.0	0.0	11.6	16.3
50 - 89	25.0	**	12.5	12.5	50.0	**
90 or more	46.2	15.4	23.1	38.5	84.6	61.5
Rest of Saskatchewan	**23.6**	**0.0**	**9.3**	**4.7**	**25.0**	**28.5**
10 - 49	14.0	0.0	5.9	4.0	15.8	22.1
50 - 89	59.9	**	19.8	**	59.9	50.0
90 or more	**	**	**	**	**	**
Saskatchewan	**23.1**	**2.4**	**10.3**	**10.3**	**29.7**	**31.6**
10 - 49	12.4	0.0	4.1	3.3	14.0	21.5
50 - 89	42.8	4.7	18.9	9.5	61.8	47.6
90 or more	63.5	13.7	36.2	49.9	86.3	72.6

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
Regina CMA	**	**	3,105	3,091	3,313	3,179	3,941	3,883	3,260	3,223
Saskatoon CMA	**	**	2,636	2,582	2,746	2,461	2,828	2,812	2,691	2,544
Rest of Saskatchewan	**	1,686	2,205	2,273	2,856	2,870	3,970	3,813	2,357	2,447
Saskatchewan	**1,611**	**1,699**	**2,536**	**2,521**	**2,949**	**2,743**	**3,455**	**3,333**	**2,713**	**2,667**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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O1 Building Structure Makeup (%)
Saskatchewan

Centre	Concrete Frame	Wood Frame
Saskatchewan	**25.6**	**74.4**

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Saskatchewan

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Regina CMA	Cable	27.0	70.3	2.7	**
	Telephone	**	97.3	**	**
Saskatoon CMA	Cable	23.1	69.2	3.1	**
	Telephone	1.5	92.3	**	**
Rest of Saskatchewan	Cable	18.5	66.2	13.8	37.25
	Telephone	3.1	90.8	1.5	**
Saskatchewan	**Cable**	**22.2**	**68.3**	**7.2**	**37.86**
	Telephone	**1.8**	**92.8**	**0.6**	**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre	Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	**	11.6 a	4.7 a	6.8 a
Saskatoon CMA	2.7 a	11.1 a	11.2 a	9.6 a
Rest of Saskatchewan	8.6 b	12.3 c	15.2 a	14.1 c
Saskatchewan	**4.6 a**	**11.6 a**	**11.3 a**	**10.6 a**

The following letter codes are used to indicate the reliability of the estimates:
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O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre		Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	Semi Private	**	**	**	**
	Bachelor	**	2,719 a	3,378 a	3,091 a
	One Bedroom	**	**	3,154 a	3,179 a
	Two Bedroom +	**	**	3,797 a	3,883 a
	All	**	3,032 a	3,313 a	3,223 a
Saskatoon CMA	Semi Private	**	**	**	**
	Bachelor	2,063 a	2,161 a	2,830 a	2,582 a
	One Bedroom	**	**	3,044 a	2,461 a
	Two Bedroom +	**	**	3,158 a	2,812 a
	All	1,342 a	2,324 a	2,960 a	2,544 a
Rest of Saskatchewan	Semi Private	**	**	**	1,686 a
	Bachelor	2,187 a	2,164 a	2,312 a	2,273 a
	One Bedroom	**	**	2,903 a	2,870 a
	Two Bedroom +	**	**	3,813 a	3,813 a
	All	2,160 a	2,205 a	2,526 a	2,447 a
Saskatchewan	**Semi Private**	**	**	1,729 a	1,699 a
	Bachelor	2,155 a	2,363 a	2,636 a	2,521 a
	One Bedroom	**	2,672 a	3,041 a	2,743 a
	Two Bedroom +	**	**	3,539 a	3,333 a
	All	1,636 a	2,552 a	2,867 a	2,667 a

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized;
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2012 to be included in the 2013 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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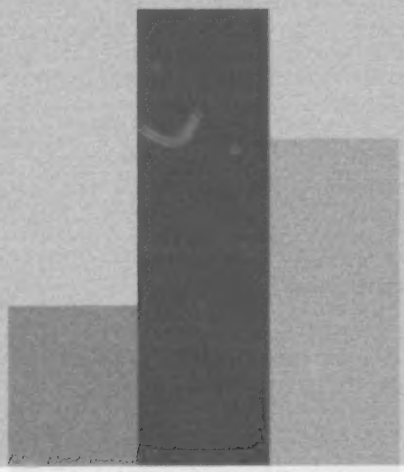

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